

USDA Foreign Agricultural Service

GAIN Report

Global Agricultural Information Network

THIS REPORT CONTAINS ASSESSMENTS OF COMMODITY AND TRADE ISSUES MADE BY
USDA STAFF AND NOT NECESSARILY STATEMENTS OF OFFICIAL U.S. GOVERNMENT
POLICY

Voluntary Public

Date: 6/1/2011

GAIN Report Number: IT1121

Italy

Post: Rome

Italy Pet Food Sector Overview 2011

Report Categories:

Product Brief

Approved By:

James Dever

Prepared By:

Dana Biasetti

Report Highlights:

Italy is an interesting and lucrative market for U.S. pet food as demand continues to grow despite the soft economy.

Leading factors for this growth include the increased importance of pets in Italian families and better marketing via large-scale outlets and specialized stores. According to industry figures, the Italian market for cat and dog food grew 2.2% in 2010 to €1.7 billion.

General Information:

General Information: Italian Pet Food Sector Overview

Italy is an interesting and lucrative market for U.S. pet food as demand continues to grow despite the soft economy. Leading factors for this growth include the increased importance of pets in Italian families and better marketing via large-scale outlets and specialized stores. According to industry figures, the Italian market for cat and dog food grew 2.2% in 2010 to €1.7 billion.

Italian Pet Ownership

Italy—with a population 58 million people—has a pet population of 60 million, including the largest cat and dog populations in Europe. Pet ownership in Italy is distributed as follows: Cats - 7.4 million, Dogs – 7.0 million, Rabbits – 2.0 million, Turtles – 1.0 million, Fish – 30 million, and Birds – 13.0 million.

The role of pets in Italy has changed over the years. Modern Italian families increasingly have pets for companionship and to enhance human well-being. This new role is a result of Italy's changing demographics, family structure, and general regard for animals. The increased number and importance of pets translates into greater care and into higher expenditures for food, health, accessories, and services.

As a result of increased care, the Italian market for pet food has also become more diversified in recent years. Pet owners increasingly demand specific types of pet food. As a result, a wide variety of pet foods that meet very specific needs related to the age (for young, adult and older animals), lifestyle (high-energy or light diets), and health condition (for diets that prevent allergies or address certain diseases) of pets are increasing popular in the Italian market. In short, Italian demand for dog and cat food is becoming more and more “specialized.”

The latest industry figures indicate that the Italian pet food market's growth potential remains significant. This is because only 60% of Italian pet owners feed their pets commercial pet food (57% for dogs and 64% for cats), rather than home-made food or leftovers—a percentage far below the 80% average for western European countries. The percentage increased because an increasing number of pet owners buy pet food in order to. Industry sources expect commercial purchases to increase as pet owners increasingly demand better nutrition for their pets.

Pet food for ‘other’ pets (i.e., not cats or dogs) amounted to €21 million or a 1.1% decrease from the previous year. Bird food accounts for 37% percent share of the ‘other’ category and grew by 4.2% in 2010. Food for rodents ranks second, accounting for 29% of the ‘other’ pet food. The market for fish food ranks third and remained stable.

Italy is a major pet food importer and imports about 50% of its growing consumption requirements. Dry dog food is the leading import, followed by wet cat food. Demand for imported pet snacks and treats far exceeds local production. In 2010, Italy imported \$ 535.2 million and exported \$ 228.9 million of pet food (dog and cat food). Italy is the third largest European importer of pet food from the United States, behind the U.K. and the Netherlands. U.S. exports of manufactured pet food to Italy amounted to \$5 million (€3.8 million) in 2010.

U.S. Pet Food Exports to Italy

**Area / Partners of Destination
And Commodities Exported
Thousands of Dollars**

**January - December
Cumulative To Date Quantities/Values in**

Partner	Product	2009		2010	
		Value	Qty	Value	Qty
Italy(*)	Pet Foods	7,040	4,614.70	5,129	4,159.00
Italy(*)	2309100000 - DOG + CAT FOOD	6,306	3,995.90	4,244	3,235.20
Italy(*)	2309901010 - PET FOOD	734	618.7	885	923.7
Grand Total		7,040	4,614.70	5,129	4,159.00

Notes:

- 1. Data Source: Department of Commerce, U.S. Census Bureau, Foreign Trade Statistics**
- 2. (*) denotes a country that is a summarization of its component countries.**

4. Product Group : BICO-HS10

Best Product Prospects

In addition to premium and super-premium type of pet foods, products differentiated according to breed, size, and age as well as to food allergies are increasingly popular. A current popular trend in Italy is for natural pet food products that guarantee they contain only natural or organic ingredients, without artificial coloring or preservatives. Popular ingredients for these natural pet foods include vegetables, herbs, fruit, cereals, and wild meat and fish. Many pet owners increasingly prefer snacks and treats that are preservative-free and contain healthy ingredients, such as fruit and cereals. Products such as these are increasingly purchased for their functional, for example dental hygiene.

Complexity of Exporting to Italy and the EU

The export of U.S. manufactured pet food to Italy and the EU in general is extra-ordinarily difficult due to the following:

- The EU has extremely complex requirements for the importation of pet food.
- Those U.S. manufacturers who wish to export pet food to the EU, must begin planning well in advance of the production of the product. They must source only certain ingredients from certain approved suppliers, and must produce the materials under stringent EU requirements and specific processing parameters.
- When a U.S. manufacturer is interested in applying for the necessary approval, they should contact the APHIS Area Office for the state in which the production facility is located for more information.
- The approval process is lengthy, and the product cannot be exported until when, and if, the approval is granted.

General Information on the EU Feed and Pet Food Labeling Requirements

(The complete USEU GAIN report on EU Feed and Pet Food Labeling Requirements can be viewed at:

http://gain.fas.usda.gov/Recent%20GAIN%20Publications/EU%20Feed%20and%20Pet%20Food%20Labeling%20Requirements_Brussels%20USEU_EU-27_9-24-2010.pdf)

[Regulation 767/2009](#), which went into effect on September 1, 2010, sets out new rules for the labeling and marketing of feed and pet food in the EU. The main objective of this regulation is the harmonization and simplification of feed legislation by setting out general and specific labeling requirements for feed materials, compound feed and medicated or dietetic feed for both food and non-food producing animals. The new rules will not only apply to on-pack labels but also to other information

systems such as the Internet and advertizing. Feed and pet food not complying with [Regulation 767/2009](#) and with the provisions on feed additives laid down in [Regulation 1831/2003](#) and [Directive 90/167/EC](#) will not be allowed on the EU market.

[Regulation 767/2009](#) also applies to other Community provisions applicable in the field of animal nutrition such as the GM Food & Feed Regulation ([Regulation 1829/2003](#)), the Organic Production & Labeling Regulation ([Regulation 834/2007](#)) and the Animal By-Products Regulation ([Regulation 1774/2002](#), as of March 4, 2011 [Regulation 1069/2009](#)).

General Mandatory Labeling Requirements

Mandatory labeling information must be given in a clearly legible and indelible way, in the official language(s) of the Member State where the product is marketed. Feed and pet food marketed in bulk or in unsealed packages and containers must be accompanied by a document containing all mandatory labeling information established by [Regulation 767/2009](#). In addition to the general labeling requirements, [Regulation 767/2009](#) also establishes specific labeling requirements for feed materials, compound feed, dietetic feed, pet food and contaminated feed.

[Commission Regulation 454/2010](#) allows a transitional period until August 31, 2011 to comply with the new pet food labeling requirements.

Trade Show Opportunity in Italy – ZOOMARK 2013

FAS in collaboration with FCS promotes a U.S. Pavilion at "Zoomark International", Italy's leading bi-annual pet food and products show - www.zoomark.it. The next edition will take place in Bologna from May 9-12, 2013.

Contact Information

The Italian pet association is Scivac
www.scivac.it

The Italian Pet Feed and Care Association is Assalco
www.assalco.it/

For additional Italy pet food information please contact the USDA-FAS Rome, Italy office:

Tel: (011) (39) 06 4674 2396

E-mail: agrome@fas.usda.gov

Webpage: <http://italy.usembassy.gov/agtrade.html>